

# Memorandum

**To:** Connecticut Energy Efficiency Board

**From:** Stacy Sherwood, Energy Futures Group Technical Consultant Team Lead, Leigh Michael, Illume Advising Diversity Equity and Inclusion Consultant Lead, and James Williamson, Sedor Engineering, Executive Secretary

**Date:** 12/4/2023

**Re:** Proposed 2024 Work Plan and Budget for the EEB Consultants

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The Energy Futures Group (EFG) Technical Consultant Team, Illume Advising (Illume) Diversity Equity and Inclusion (“DEI”) Consultant Team and James Williamson of Sedor Engineering (collectively referred to as the “Consultant Teams”) look forward to continuing to provide consultant services to the Connecticut Energy Efficiency Board (EEB) in 2024. Please find attached for your review:

- The proposed 2024 EEB budgets for the Board’s Technical Consultants, DEI Consultants, and Executive Secretary.
- The individual work plans for each Technical Consultant team or work area, the DEI Consultants, and for the Executive Secretary.

For 2024, the Consultant Teams propose a 12-month budget of \$872,454, which covers 4,309 personnel hours plus expenses for all Consultants. Overall, this is an increase of 337 hours more than the 2023 budget and represents a 5.3% increase from the 2023 budget. The budgets and scopes of work were developed based upon our current understanding of the EEB’s needs and expectations, the projected involvement with the Conservation and Load Management (“C&LM”) Plan in 2024, the 2025-2027 C&LM plan, and how best the DEI and Technical Consultants, along with the Executive Secretary can support these efforts.

We will work closely with the Board, Board Leadership, Committee chairs, and the Consultant Committee throughout the year to prioritize the Consultants’ scopes of work so that our tasks and assignments best match the available funding. We will strive to maximize our value to the EEB and to focus on the highest priority tasks to ensure the Board receives the required services and technical support in 2024. Additionally, we will make scope and task adjustments with the Consultant Committee along the way as necessary, while managing the total budget available.

In 2024 we envision continuing our oversight and support of program implementation, with a strong focus on the integration of equity benchmarks and metrics throughout the C&LM programs. Additionally, we plan on integrating equity practices throughout the Board's monthly meetings and public input sessions. Whenever possible, we will bring best practices from other jurisdictions to the table for consideration in Connecticut. We will also continue our efforts to provide the EEB with a cohesive team of consultants, including the Evaluation Administrators. The Consulting Teams will continue our work with the Companies and stakeholders to ensure that the C&LM programs continue successfully as it encounters new challenges and opportunities.

Please note that the EEB Consultant budget and work plan is for DEI and Technical Consultant Teams and the Executive Secretary for the period of January through December 2024. To manage to the overall budget, we request the flexibility to allocate hours and budgets across the consultant positions and work plans, and across the tasks within any work plan, which we will communicate to the Chairs and Consultant Committee. This request is consistent with previous practices of the Board. Furthermore, we will stay within the total Board budget for the total work plan scope as proposed, but may need to reallocate funding across positions and across tasks to be able to best address changes in our work and to respond to evolving Board priorities and interests during the year; as we have done in prior years.

We look forward to continuing as your Technical Consultant Team, DEI Consultant Team, and Executive Secretary in 2024.

### **Executive Secretary**

Next year will serve as the first full budget year for the current Executive Secretary. The Executive Secretary's 2024 budget is approximately 6.2% lower than the previous Executive Secretary's 2023 budget, with 109 more hours but at a lower hourly rate, resulting in \$5,168 less for the 2024 budget. Please also note the tab in the budget workbook that details the estimated Executive Secretary's 2024 expenses, including travel and related business expenditures.

### **DEI Consultant**

ILLUME's proposed 2024 work plan is based on its contracted budget and scope of work. In 2024, we propose a budget of \$117,600, which includes a total of 556 personnel hours plus expenses allocated for completion of surveys. Compared to 2023, the 2024 budget is 4.3% higher and includes 109 additional hours.

In 2024, the DEI Consultants will complete the following tasks:

- Adhoc attendance of EEB meetings.
- Ad Hoc technical consulting to address items such as the 2025-2027 Plan, development of the utilities Communities request for proposal, and support for the equity baseline study being completed by the Evaluation Administrator.
- Community Based Organizations Interviews to identify the needs and priorities of Connecticut communities, defining priority populations, and development the equity metrics.
- Define the target populations for both the residential and commercial sectors.
- Development of the equity indicator framework that will help the EEB measure how the C&LM is meeting the state goals.

### **EFG Technical Consultant Team**

EFG’s proposed 2024 work plans are based on the agreed upon scope of work and budget approved in September and October 2022 Board Meetings, respectively. For 2024, we propose a 12-month budget of \$676,638, which covers 2,901 personnel hours plus expenses for all Technical Consultants. This proposed 2024 budget reflects 73 more hours, as was allocated to address the 2025-2027 Plan development, and 7.8% higher in total budget than the 2023 budget, reflecting the increase in hours and a rate increase approved as part of the 2022 Technical Consultant Request for Proposal process.<sup>1</sup>

The Technical Consultant Team has proposed a budget and hours which include the following tasks for 2024:

- Working with the EEB, the Department of Energy and Environmental Protection (“DEEP”) and the Companies on aligning the Inflation Reduction Act rebates and tax credits with the C&LM programs and coordinating the Home Energy Solutions-Income Eligible program with the state’s Weatherization Assistance Program.
- Hold Policy Working Group (“PWG”) meeting quarterly.
- Collaboration with the DEI Consultant to develop equity framework and finalize equity metrics for both the residential and commercial and industrial sectors.
- In-person meetings with attendance from at least one Technical Consultant Lead (Stacy Sherwood, Richard Faesy, and George Lawrence) and remaining consultants attending virtually.<sup>2</sup>
- Work throughout the year with the EEB, Companies, and stakeholders to develop the 2025-2027 C&LM Plan.

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<sup>1</sup> In 2023, the Technical Consultant rate was \$222 per hour and in 2024, it has increased to \$232 per hour.

<sup>2</sup> Technical Consultants will each attend five meetings and the annual planning meeting. Attendance will be determined based on the content at the meetings and/or other coordinating C&LM events.

2024 Proposed Consultant Budget  
Energy Efficiency Board

2024 Proposed Consultant Budget Energy Efficiency Board			Proposed 2023 EEB Consultant Budget				2024	Change In Consultant Budget 2023 Approved vs. 2024 Proposed			
							12 Month Budget				
Consultant	Proposed Budget for EEB Consultants	Firm	Proposed Hours	2023 Rate	Total Labor Budget	Total Expenses	Total (\$)	Delta hours*	Delta Total Budget (\$)	Delta Total Budget (%)	
Technical	<b>Team Lead/Board Liaison/Planning</b>										
	Stacy Sherwood	Energy Futures Group	832	\$232	\$193,024	\$7,627	\$200,651	79	\$28,763	15.1%	
	<b>Marketing/Analysis Consultant</b>										
	Ashley Nicholls	Doer/Maker	130	\$232	\$30,160	\$0	\$30,160	(38)	(\$7,736)	10.3%	
	<b>Cross-Sector Analysis Consultant</b>										
	Chris Neme	Energy Futures Group	50	\$232	\$11,600	\$0	\$11,600				
	Phil Mosenthal	NV5	40	\$232	\$9,280	\$0	\$9,280				
	Stacy Sherwood*	Energy Futures Group	40	\$232	\$4,640	\$0	\$4,640				
	<b>Cross-Sector Analysis Total</b>			130		\$25,520	\$0	\$25,520	(60)	(\$12,220)	-43.4%
	<b>Commercial &amp; Industrial Consultant</b>										
	George Lawrence	Caerbannog Consulting	747	\$232	\$173,304	\$2,565	\$175,869				
	Phil Mosenthal	NV5	120	\$232	\$27,840	\$3	\$27,843				
	Dan Mellinger	Energy Futures Group	40	\$232	\$9,280	\$0	\$9,280				
	Other NV5 Analytic Staff	NV5	30	\$232	\$6,960	\$0	\$6,960				
	<b>C&amp;I Total</b>			937		\$217,384	\$2,568	\$219,952	14	\$10,686	5.1%
	<b>Residential Consultant</b>										
	Richard Faesy	Energy Futures Group	625	\$232	\$145,000	\$2,565	\$147,565				
	Glenn Reed	Energy Futures Group	120	\$232	\$27,840	\$0	\$27,840				
	Elizabeth Chant	NV5	30	\$232	\$6,960	\$0	\$6,960				
	Other EFG Analytical Staff	Energy Futures Group	40	\$232	\$9,280	\$0	\$9,280				
<b>Residential Total</b>			815		\$189,080	\$2,565	\$191,645	79	\$24,493	20.0%	
<b>RD&amp;D Consultant</b>											
Dan Mellinger	Energy Futures Group	30	\$232	\$6,960	\$0	\$6,960	0	\$300	-32.8%		
<b>Admin &amp; Accounting Support Staff</b>											
	Energy Futures Group		27	\$62	\$1,674	\$0	\$1,674	-1	\$22	12.8%	
<b>Subtotal -- Technical Consultants</b>			2,901		\$663,802	\$12,761	\$676,563	73	\$48,890	7.8%	
<b>DEI</b>	<b>DEI Consultant</b>	Illume Advising	556	Varies	\$116,400	\$1,200	\$117,600				
<b>Subtotal -- DEI Consultants</b>			556		\$116,400	\$1,200	\$117,600	90	4,820	4.3%	
<b>Executive Secretary</b>	<b>James Williamson</b>	Sedor Engineering	852	\$90	\$77,021	\$1,270	\$78,291				
<b>Subtotal -- Executive Secretary</b>			852		\$77,021	\$1,270	\$78,291	109	(\$5,168)	-6.2%	
<b>Total Budget</b>			4,309		\$857,223	\$15,231	\$872,454	337	\$43,961	5.3%	

\* Due to a calculation error, Stacy Sherwood will only bill 20 of the 40 allocated hours for cross sector



## Memorandum

**To:** Energy Efficiency Board / Consultant Committee  
**From:** James Williamson, EEB Executive Secretary  
**Date:** 12/4/2023  
**Re:** Sedor Engineering 2024 Workplan for EEB Executive Secretary

**Energy Efficiency Board (EEB) Executive Secretary (Sedor Engineering)  
 Proposed January 1, 2024 – December 31<sup>st</sup>, 2024 Work Plan with Tasks**

<b>Assignments and Tasks for 2024</b>	<b>Total Hours</b>
<b>1. Facilitate communication among EEB members, Technical Consultants, and the Companies.</b> Maintain timely and appropriate level of communications among EEB members, Technical Consultants, and the Companies. Determine EEB member concerns and develop/provide information to Board members as needed.	45
<b>2. Coordinate EEB filings/reports to DEEP, PURA and the legislature, and support Board Consultants in meeting other CT regulatory and policy responsibilities.</b> Under the direction of the EEB Chair or Vice-Chair, coordinate all required PURA and DEEP filings for the EEB and responses to requests from the legislature. Ensure that submittals are complete, accurate and on time.	15
<b>3. Support EEB monthly and other meetings.</b> Attend all EEB monthly meetings, in addition to Public Input Sessions and Annual Planning Meeting. Manage planning and development of agendas, develop meeting materials in coordination with Company staff and Technical Consultants, send out meeting notices. Take notes at meeting and write minutes to be reviewed by the Technical Consultants prior to the meeting minutes being filed within 7 days of the meeting. Provide logistical planning and support for meetings.	200
<b>4. Support EEB Committees.</b> Support Residential, C&I, Consultant and Joint EEB/Green Bank Committees. Develop agendas and coordinate meeting logistics in coordination with Technical Consultants, Companies, DEEP, and Green Bank. Attend committee meetings and take minutes if requested by the Committee chairs. For the Evaluation Committee, support the evaluation process as defined in the Evaluation Roadmap (i.e., specific duties of the Executive Secretary).	305
<b>5. Manage consultant invoicing process and other issues.</b> Monitor Consultants' billing practices to ensure that bills are kept current and that invoices are paid on time. Maintain monthly tracking of invoice amounts and adherence to annual work plans. Ensure that Board consultants are operating on an approved EEB timelines; that issues that may arise between program administrators and the Technical Consultants are flagged and identified for EEB review; and that EEB Consultants provide timely and clear reports to the EEB on key issues, proposed resolution of issues, and unresolved issues that require EEB review and action.	45

<p><b>6. Maintain EEB documents and records.</b> Post documents on Energize CT website and Box.com. Publish agendas, minutes and other EEB documents as needed to maintain full written record of EEB activities and meet requirements of the Freedom of Information Act. Maintain written and electronic records of printed materials and communication, including emails, and provide sufficient redundancy/back-up in case the EEB's primary data repository becomes inoperative. Updating EnergizeCT website to address C&amp;LM Plan documents and reporting availability and improve accessibility.</p>	65
<p><b>7. Maintain EEB calendars, EEB website, and internal/external contact lists.</b> Keep all EEB calendars current, and support EEB and committees as needed with scheduling. Maintain internal and external contact lists. Maintain EEB website in coordination with the Companies and the Marketing Technical Consultant.</p>	60
<p><b>8. Act as point of public contact, as directed by EEB, Chair or Vice-Chair.</b> Act as point of contact for the public to provide information on the EEB Roadmap and for other purposes. Act as point of contact for State Legislators, the Governor's Office, PURA, DEEP, CEFA and other public officials. Forward requests to the EEB Chair, board members or utilities as appropriate. Act as point of contact for the media, consulting with the EEB Chair or other board members for responses.</p>	50
<p><b>9. Support annual program planning and budgeting.</b> Support Technical Consultants and Companies in developing the 2024 Update to the 2022-2024 C&amp;LM Plan. Support development of planning schedule, and coordinate conference calls and review of materials. Assure planning schedule is adhered to.</p>	15
<p><b>10. Updates to the new EnergizeCT Webpage and EEB Operating Procedures.</b> Support updates to EnergizeCT website including ongoing transition to the new document library. Investigate EEB processes and provide revisions to Operating Procedures document.</p>	52
<p><b>Total Hours</b></p>	852

**Costs**

<p><b>James Williamson @ 90.40/hr for 852 hours</b></p>	<p><b>\$77,019</b></p>
<p><b>Travel and Other Expenses</b></p>	<p><b>\$1,270</b></p>
<p><b>Total Budget</b></p>	<p><b>\$78,289</b></p>



**2024 Expense Detail**

“Total Expense” matches amount in original response to RFP:

Expense	Annual Cost
Box File Storage	\$720
Zoom Meeting Hosting	\$160
Carbonite Data Backup	\$155
Misc (printing, other)	\$235
<b>Total</b>	<b>\$1,270</b>

- Changes between 2023 and 2024 workplan include:
  - upgrade of box.com subscription service (from \$10/month to \$60/month)
  - removal of Turbobridge conference line (\$10/month)
  - addition of Carbonite cloud backup service. (\$160/year)

**Cost Table from Original RFP Response**

The costs proposed in the original RFP response are shown in the table below. The proposed 2024 workplan matches the labor and expense costs originally submitted:

Period (Year)	Duration (months)	Labor (hours)	Labor (\$)	Expenses (\$)	Total (\$)
2023	6	426	\$ 38,509	\$ 635	\$ 39,144
2024	12	852	\$ 77,019	\$ 1,270	\$ 78,289
2025	12	852	\$ 77,019	\$ 1,270	\$ 78,289
2026	6	426	\$ 38,509	\$ 635	\$ 39,144
<b>Contract Total</b>	<b>36</b>	<b>2556</b>	<b>\$ 231,056</b>	<b>\$ 3,810</b>	<b>\$ 234,866</b>

Note: The 2023 workplan included an additional 71 hours added for training during June 2023.

**2023 WorkPlan**

For comparison, a summary of the 2023 workplan table is shown below:

<b>TOTAL HOURS</b>		<b>497</b>
<b>Executive Secretary Budget</b>		
James Williamson at \$90.40/hr	497 Hours	<b>\$44,929</b>
Travel & Other Expenses		<b>\$635</b>
<b>TOTAL BUDGET</b>		<b>\$45,564</b>



**Comparison of 2023 YTD Hours, 2023 Work Plan, and 2024 Workplan**

Dates:	6/1/23 - 11/17/23	6/1/23 - 12/31/23	6/1/23 - 12/31/23	6/1/23 - 12/31/23	1/1/24 - 12/31/24
Description:	2023 Actual (YTD)	2023 Work plan (7 month)	2023 Spend Prediction (7 month)	2023 Prediction Relative to 2023 Plan (7 month)	Prediction for 2024 (12 month)
1 - Training	71	71	71	100%	0
2 - Internal Communication	17.75	35	21	61%	45
3 - Regulatory/Filing	2.25	20	3	14%	15
4 - EEB	84	98	101	103%	200
5 - Committees	134.5	83	162	196%	305
6 - Invoicing and Issues	17.25	30	21	69%	45
7 - Documentation	24.75	40	30	75%	65
8 - Scheduling & Lists	25.5	25	31	123%	60
9 - Public Contact	20.75	20	25	125%	50
10 - Plan & Budget	2	15	2	16%	15
11 - Website & Manuals	6.5	60	8	13%	52
<b>Total</b>	<b>406.25</b>	<b>497</b>	<b>476</b>	<b>96%</b>	<b>852</b>

- Proposed hours for the 2024 workplan have been adjusted based on actual hours billed from 6/1/23 through 11/17/23. The 2024 Projections were set roughly based on a factor of 2x of the 2023 Spend prediction (based on actual YTD spend).
- Notable changes from 2023 to 2024 include:
  - increase in hours allocated towards “committees” task (based on YTD spend).
  - additional time allocated to support the rollout of the Energize CT file storage database.
- The predicted total spend of the 2023 work plan is ~96% of labor hours.



## EEB DEI Consultant: 2024 Work Plan

**PREPARED FOR:** CT Energy Efficiency Board (EEB)

**PREPARED BY:** ILLUME Advising, LLC

**DATE:** REVISED – December 3, 2023

**TITLE:** Equity Energy Efficiency Board (EEB) DEI Consultant 2024 Work Plan

This memo summarizes the tasks that the DEI Consultant Team (“the Team”) anticipates completing in our 2024 engagement. Here, we provide descriptions and cost estimates for our core work.

### Overview

The table below summarizes our proposed set of 2024 tasks. Each task in the table is hyperlinked to allow easy navigation to the task overview in this document.

We recommend the following tasks as part of our core 2024 DEI Consultant Team role. These tasks total \$117,600 representing 100% of our allocated budget for 2024. Please note that all these tasks are intended to fall within the existing authority of the EEB, C&LM programs, and DEEP.

2024 TASKS	ESTIMATE
Task 1: EEB Board Meetings and Committee Meetings	\$25,000
Task 2: Ad Hoc Technical Consulting	\$10,000
Task 3: Project Administration	\$12,000
Task: 4. Community Stakeholder Engagement: CBO Interviews	\$20,000
Task 5. Define the “Who:” Target Populations Definition Development (Individual Identifiers)	\$10,000
Task 6. Articulate the Longer-Term “How:” Equity Indicator Framework Development	\$40,600
<b>TOTAL</b>	<b>\$117,600</b>

### 2023 Tasks and Budget Progress to Date

Below we capture spend-to-date for each of the 2023 tasks. We also provide explanation around our spend below this table.

2023 TASKS	BUDGET ESTIMATES	COSTS (11/17/2023)	SPEND RATE
1. EEB Board Meetings and Committee Meetings	\$24,780	\$48,126.25	194%
2. Ad Hoc Technical Consulting	\$15,000	\$5,075.75	34%
3. Project Administration	\$18,000	\$10,540.00	59%
4. Define the “What”: Equity Goal Development	\$26,000	\$16,831.25	65%
5. Articulate the Near-Term “How:” 2024 PMI Equity Metric Development	\$17,000	\$10,886.50	64%
6. Define the “Who:” Target Populations Definition Development [activity 1]	\$12,000	\$4,802.00	40%
<b>TOTAL</b>	<b>\$112,780</b>	<b>\$96,261.75</b>	<b>85%</b>

**Explanation around overages for Task 1 and under-spend for Tasks 4, 5, and 6:** In 2023 workplan, we noted that the Task 1- EEB Board Meetings and Committee Meetings budget was based on the assumption that the DEI Consultants would spend six hours per month attending meetings. We also noted that “should the EEB wish ILLUME to attend all EEB Board Meetings and Committee Meetings, extra budget will be required.” Based on the direction we received from EEB, ILLUME attended all EEB Board meetings, all Residential and C&C Committee meetings, all Consultant Committee meetings, and other Committee meetings (e.g., Evaluation Committee, Green Bank) as needed. ILLUME spent more time attending meetings than we had budgeted for, which was one reason for this overage.

Another reason for the overage is around the way we billed our time in 2023. ILLUME presented at a total of 20 Board and Committee meetings. We billed much of the time we spent preparing for these presentations – developing slide decks, meeting with the Technical Consultants, sending out deliverable drafts for the EEB/TCs to review – to Task 1, although the content for those presentations related to work we were undertaking for Tasks 4, 5, and 6.

**Explanation for under-spend for Task 3:** As a gesture of goodwill, ILLUME no-billed \$14,316.50 of our time in January 2023.

**Planned billing for the rest of 2023:** We anticipate billing significant time to Tasks 4 and 6 in December, which will include finalizing the equity goals presented at the July Annual Planning Meeting, conducting survey data analysis, benchmarking equity metrics, and conducting 1:1 meetings with EEB board members on target population definitions.

**How we adjusted our approach for 2024:** ILLUME increased the budget for content-specific tasks (task 4-6) and will only bill time spent attending meetings to Task 1 – in other words, preparation for meeting materials (e.g., presentations, surveys) will be billed to the specific task area (e.g., Task 2, 4, 5, or 6) we are covering with the Board/Committee during the meeting.

ILLUME also reduced the 2024 budget for Task 2: Ad Hoc Technical Consulting in 2024 by \$5,000 (2023 budget: \$15,000; 2024 budget: \$10,000).

Finally, ILLUME reduced the budget for Task 3: Project Administration by \$6,000 (2023 budget: \$18,000; 2024 budget: \$12,000).

## 2024 Core Tasks

In this section, we document a set of recommended core 2024 tasks for the EEB's consideration.

### 1. EEB Board Meetings and Committee Meetings

Budget: \$25,000 (assumes 10 hours/month)

Timeline: Q1-Q4 2024

How this task will support the EEB: Several key players (e.g., the EEB, the DEEP, the Companies, the Technical Consultants, and other community stakeholders) will shape how Connecticut's conservation and load management (C&L) programs center and advance equity across the state. When it comes to equity, it is critical that these players have an aligned vision around their goals (the **who** and the **what**), their approach (the **how**), and their implementation plan (the **when**). By attending these meetings, the ILLUME Team will support effective coordination across key players.

Note that the volume of meetings taxes ILLUME's resources – and, by extension, the budget. To preserve budget, ILLUME recommends working with the EEB to define which meetings are critical for ILLUME to attend to meet our other priorities for the year (see the rest of this workplan). This budget assumes the DEI team will dedicate 10 hours per month to meetings; some of these meetings will include two ILLUME staff. Should the EEB wish ILLUME to attend all EEB Board Meetings and Committee Meetings, extra budget will be required.

Activities: One member of the ILLUME Team will attend select board and committee meetings; ILLUME will work with the other Technical Consultants to develop a schedule of meetings to attend that align with key decision-making milestones. Our team will document key meetings we plan to attend – and key decisions that need to be made during those meetings to move planned DEI objectives forward – and share this with the EEB to ensure that everyone is in alignment.

As we did in 2023, ILLUME proposes that existing Committee meetings be used to make key decisions related to DEI work in 2024. The Technical Consultants will support ILLUME in allocating time during existing Committee meetings (e.g., Residential, C&I) to facilitate this work. Where appropriate, we may attend portions of Committee meetings (i.e., not the whole meeting).

The ILLUME team will complete the following activities for each EEB Board and Committee meeting:

1. Meeting preparation: Preparing materials, progress updates, and discussion points
2. Meeting agenda: Coordinate with the EEB, Technical Consultants, and Executive Secretary in identifying agenda items
3. Meeting attendance and facilitation: Attending select EEB Board and Committee meetings (or portions of meetings) and facilitating portions of meetings to enable decision-making
4. [as needed] Follow-up on action items: Managing action items where ILLUME can support effective coordination across the EEB and other key stakeholders

ILLUME has also budgeted for one staff member to attend the Annual Planning Meeting in person. To accommodate this, we will work strategically with the Technical Consultants to determine where we can find efficiencies in meeting attendance (i.e., attending portions of Board and Committee meetings rather than full meetings) to accommodate the cost of travel.

Deliverable(s): [as needed] advance reading material, presentation slides, meeting agenda coordination, meeting facilitation, follow-up action items

## 2. Ad Hoc Technical Consulting

Budget: \$10,000 (assumes 4 hours/month)

Timeline: Q1-Q4 2024

How this task will support the EEB: The State of Connecticut is building a strategy to advance equity in C&LM programs in a complex, ever-changing, and nuanced environment. In ILLUME's experience working on similar efforts with other clients (New York State, Maine, ComEd), we understand that there is no concrete 'roadmap' – unique needs around coordination, problem-solving, and prioritization will inevitably arise. We recommend proactively earmarking budget for allow the ILLUME team to respond to these emergent needs. This task will also account for advisory support to the Evaluation Administrators as they implement the Equity Baseline Study.

Activities: The ILLUME team will leave the activities for ad hoc technical consulting open-ended, as we would like to be able to respond to emergent needs as they arise. This task might include the following activities (as outlined in the RFP):

1. Present on progress and topics of interest as requested by the EEB during monthly meetings
2. Consult on the development of the C&LM Plan Update, which the utilities will submit for DEEP approval in November
3. Advise on the development of the utilities' Communities RFP outreach strategy and additional outreach strategies
4. Support the Evaluation Administrators as they implement the Equity Baseline Study

Deliverable(s): Dependent on emergent needs

## 3. Project Administration

Budget: \$12,000 (assumes 4.5 hours/month of project management/admin support)

Timeline: Q1-Q4 2024

How this task will support the EEB: This task ensures that the EEB and the ILLUME team have up-front alignment on the core roles and responsibilities of the ILLUME team in 2024. It also ensures that ILLUME can deliver on the EEB's expectations and keep our work on schedule, within scope, and within budget.

Activities: This task consists of 2023 workplan development (this document) and, as needed, revisions to the workplan after receiving guidance from the EEB. It also covers project management activities that do not fall directly into one of the other task areas, including:

- Resource planning
- Budget oversight
- Contractual activities and invoicing
- Regular check-ins with the Technical Consultant team

Deliverable(s): [as needed] updates to 2024 workplan, monthly invoices

In this section, we document a set of 2024 tasks for the EEB's consideration.

#### 4. Community Stakeholder Engagement: CBO Interviews

Budget: \$20,000 (assumes 10 hours for interview guide development, 10 hours to identify CBOs, 36 hours to recruit and conduct interviews, 20 hours for analysis, 18 hours for summary results and memo development)

Timeline: Q1-Q3 2024

How this task will support the EEB: To ground-truth the work done by ILLUME and the EEB – particularly around Task 5. Define the “Who:” Target Populations Definition Development and Task 6. Articulate the Longer-Term “How:” Equity Indicator Framework Development – ILLUME recommends incorporating stakeholder engagement into the process. This exercise will help the EEB understand the needs and priorities of communities, as articulated by those communities – and this insight can feed into the definition of priority populations and the development of metrics to measure equity in C&LM programs.

Activities: We will conduct up to 12 interviews with Connecticut-based community-based organizations (CBOs) who serve communities whose experiences or perspectives align with the tasks outlined in this document. Potential types of CBOs include:

- Environmental justice
- Community advocacy
- Public health
- Economic development
- Policy advocacy

We recommend conducting interviews online via Microsoft Teams. Interviews will last 45-60 minutes, and our team will develop a semi-structured topic guide to guide each conversation. However, given the nuance of

experience or expertise each respondent may have, we propose taking more of a flexible, exploratory approach to each interview to ensure that we dig into areas that are most pertinent to them. We will provide a \$100 incentive for participation.

To identify our sample, ILLUME recommends a three-pronged approach:

1. **Request input from EEB and Committee members:** We will distribute a form where EEB and committee members can share the names (and, if available, contact information) of organizations they think we should interview
2. **Publish an interest form on the EEB website:** If possible, we will publish an interest form on the EEB website where CBOs can submit their interest in participating – or members of the public can suggest an organization they think we should interview
3. **Secondary research:** As needed, ILLUME will conduct secondary research to identify organizations to interview

The current budget can accommodate 12 interviews. Should the EEB wish us to conduct more interviews – or in-person interviews – additional budget will be required.

The findings from these interviews will help inform both priority population development and the broader equity metrics framework.

Deliverable(s): Topic guide, memo summarizing key observations and outcomes from interviews

## 5. Define the “Who:” Target Populations Definition Development (Individual Identifiers)

Budget: \$10,000 (assumes 15 hours for Activity 1, 10 hours for Activity 2, 22 hours for Activity 3)

Timeline: Q1 and Q2 2024

Addresses: Recommendation 2: Identify a Unified Definition of Priority Populations

In 2024, ILLUME will continue the work started in 2023 through:

1. Incorporate EEB/Committee feedback into benchmarking results (15 hours). ILLUME will incorporate results from the EEB/committee surveys and our 1:1s (two 2023 activities) into our benchmarking analysis. Note that we completed an initial benchmarking analysis in Q4 2023.
2. Conduct a data needs analysis (10 hours). Upon finalizing the benchmarking analysis, ILLUME will work with the data teams at the Companies to understand what access they have to and where gaps exist. This will inform our final recommendations to the EEB.
3. Work with the EEB to define priority populations for 1) the residential sector and 2) the commercial and industrial (C&I) sector (22 hours). Working from the information gained in Activities 1 and 2, ILLUME will work with the members at Committee meetings to develop a proposed approach to define priority populations in the residential sector and the C&I sector – that is, whether to a) align with other state/federal efforts and b) leverage geographic and/or individual data. Our

team will collate decisions from the decisions made at Committee meetings and develop a memo that summarize the proposed approach to define and identify priority populations.

The approach to define residential priority populations will inevitably be different from the approach to define C&I priority populations. We recommend focusing on the residential priority population definition first. Then, drawing on this definition, we will focus on developing the C&I definition.

Note: this scope covers the identified definitions/approaches leveraged at the federal and state level to identify priority populations, as well as documenting the process the EEB will use to define priority populations. Should DEEP and the EEB want to develop a tailored priority population definition – one that is entirely unique from current definitions or screening tools – extra budget will be required to build the definition and identify those populations.

In addition, this task does not include engagement with public stakeholders, as we recommend an overarching stakeholder outreach task to gain community perspectives on both Task 5 (this task) and Task 6. We provide an estimate of this in [Task 4: Stakeholder Engagement](#).

Deliverable(s): benchmarking results, memo summarizing results and recommendations, finalized residential and C&I priority population definitions

## 6. Articulate the Longer-Term “How:” Equity Indicator Framework Development

Budget: \$40,600 (assumes 25 hours for Activity 1, 85 hours for Activity 2, 15 hours for Activity 3, 20 hours for Activity 4, 48 hours for Activity 5)

Timeline: Q1-Q4 2024

How this task will support the EEB: This task will provide the EEB with a more comprehensive framework to achieve E3 Goal 3, Action 3.3 (the development of new equity metrics). The framework will produce clear, consistent, and measurable metrics across C&LM programs that will help the State meet its C&LM equity goals. It will include indicators that serve as both benchmarks to track progress over time and ultimately support goal-focused PMI metrics.

Activities: The ILLUME team will complete the following activities:

1. Collaborate with Company and State stakeholders [*note: we propose stakeholder engagement with community members in Task 4*] (25 hours). To establish an equity indicator framework that measures the effectiveness of C&LM program activities in creating multidimensional equity, we recommend conducting rigorous engagement with key stakeholders, including interviews with:
  - a. Company data teams: Understand utility programs, eligible investments, metrics, and data tracking and reporting capabilities
  - b. C&LM program managers: Understand programmatic types, funding sources, investment types, geography, scale, and funding recipients. This will help our team develop allocation and localization rules, and ensure rules are flexible for relevant programs

- c. Company and state Subject Matter Experts: Gather Subject Matter Expert (SME) input on defensible and feasible indicators, the models or assumptions needed to convert, localize, and/or monetize indicators, and feasibility within the EEB's timeline
  - d. Evaluation team: Discuss CT's data, tracking, and changes/enhancements needed to support the Distribution of Benefits analysis
2. Inventory indicators (PMI metrics and other benchmarks) for consideration (85 hours). Working from the 2022 Equity Assessment, as well as our PMI work in 2023, ILLUME will inventory a comprehensive set of benchmarks and PMI metrics for consideration. For each of these, we will document relevant measurement approaches.
3. Develop a process by which to prioritize indicators (15 hours). ILLUME will support the EEB to enable a stakeholder process that clearly identifies if and how equity-related indicators should be prioritized against primary PMI metrics. Within an equity framework, PMI metrics should be paired with a set of benchmarks within a single framework for understanding C&LM programs' progress in equity. These indicators should also align with the phases outlined in E3.
4. Conduct a needs assessment of measurement approaches and localization rules for prioritized indicators (20 hours). Along with the EEB, ILLUME will facilitate a process to identify and communicate analytical needs and gaps for calculating and/or localizing indicators (when we say "localize" we refer to the process of being able to measure the indicator's impact on a priority population).
5. Document findings in an Equity Indicator Framework (48 hours). The equity indicator framework will be a document that logically summarizes the indicators under consideration, a method for prioritization, alignment with E3, and measurement approaches.

Deliverable(s): equity indicator framework documenting indicators, prioritization, and measurement methods and potential limitations



**Energy Efficiency Board (EEB) Consultant Team Lead (Stacy Sherwood)**

**2024 Work Plan with Tasks**

Task	Tasks for 2024	Hours
1	<p><b>Team Lead: 2025-2027 Plan Development.</b> On behalf of the EEB, provide lead technical input for the development of the goals, programs, and budgets for the C&amp;LM plan portfolio, and provide technical assistance to the EEB for its review of the goals, programs, and budgets. In 2024, this task will be focused primarily on the 2025-2027 Plan, which will be developed throughout 2024. Complete analysis of program plans, program designs, marketing, budgets and budget tables, revenues/funding, cost-effectiveness, goals and objectives, key performance indicators, performance incentives, and public input analysis. Meet with the Companies and review/comment on draft Plan documents and supporting data. Perform analysis and planning for C&amp;LM goals and scenarios will be based on best practices/state comparisons early in the process. Coordinate with the DEI Consultant to ensure DEI practices and recommendations are adopted as part of the C&amp;LM and throughout Board practices involving the Technical Consultants. Attend Public Input Sessions and evaluate how that input can be incorporated in the 2025-2027 Plan.</p>	191
2	<p><b>Team Lead: Program Implementation, Monitoring, and Review of Results.</b> Review and monitor program implementation; review reporting of program performance through the Energize CT dashboard and periodic/quarterly reports; review annual results. Provide technical analysis for and meet with others on cross-sector issues including financing (CGB, DEEP, and Joint Committee), demand management and demand response, demand management pilots, thermal renewables, customer engagement, marketing, and other issues. Address key implementation issues as they arise throughout the year (e.g., HES/HES IE Redesign, electrification, new codes, C&amp;I program issues, etc.). Provide input to the EEB Evaluation Consultant on evaluation planning, and review studies, program savings documentation, and regional studies to inform program planning activities.</p>	200
3	<p><b>DEEP/Regulatory Proceedings and Support.</b> As needed, provide technical assistance for the EEB and represent the EEB in key C&amp;LM regulatory proceedings, including C&amp;LM proceedings before DEEP and PURA on C&amp;LM issues, equity, IRPs, and related technical issues. Provide technical assistance and analysis for the EEB regarding utility compliance items and DEEP Conditions of Approval. Provide support to the EEB with coordinating the Inflation Reduction Act rebates and efforts with the C&amp;LM. At the end of 2023 and into 2024, the state's Comprehensive Energy Strategy (CES) will be a focus for the Technical Consultants to evaluate any changes that need to be made to the C&amp;LM as a result of policy guidance. This will also include incorporating other statewide energy policies, statewide energy, environmental and DEI policies (such as E3, GC3 and GWSA). Integrate the DEI Consultant's recommendations on E3 and equity into the Board's activities and the C&amp;LM. Work with the EEB and other stakeholders to develop equitable meeting processes, including incorporating guidance from the GC3 and E3 proceedings.</p>	125
4	<p><b>Coordination with other EEB Consultants.</b> The Technical Consultants work closely with the other EEB consultants, including DEI, Executive Secretary, and Evaluation. This requires coordination meetings and discussions to develop recommendations on the EEB programs. In 2024, the focus will be working with the DEI Consultant for the development of equity framework and with the Evaluators to determine how results will impact 2025-2027 planning.</p>	100

5	<b>Energize CT Brand.</b> In 2023, it was identified that there should be parameters around the Energize CT Brand, in particular, what energy related matters fall under the brand, how it should be used, and what does it mean. In 2024, we will work to provide guidelines around the Energize CT Brand.	38
6	<b>EEB Meetings and Board Liaison.</b> Serve as Board liaison, provide lead technical assistance and policy analysis, prepare and present materials for, and participate in Board, EEB committee, and other meetings. In 2024, this will include engaging Board Leadership, researching and developing Board presentations on several Focus Areas, including the economics of heat pump electrification in CT. In coordination with Board members, other Board consultants, the Program Administrators, and the Board’s Executive Secretary, provide input to agenda planning, participate in planning/steering calls, prepare materials for meetings, provide technical assistance and analysis during meetings, provide advance briefings, and coordinate with and report to Board leadership. Promote cohesiveness between the Board’s consultants and serve as liaison between Board leadership and the other consultants. Ensure that the Energize CT website appropriately reflects and promotes the C&LM programs. Implementing equitable meeting practices.	178
<b>Total Hours for Tasks</b>		<b>832</b>
Stacy Sherwood	832 Hours @\$232/hr	\$193,024
Travel/Expenses		\$7,627
<b>TOTAL BUDGET</b>		<b>\$199,060</b>

**Energy Efficiency Board (EEB) Cross-Sector Analysis Consultants  
(Chris Neme, Phil Mosenthal, Stacy Sherwood, and Other  
Optimal Staff)**

**2024 Work Plan with Tasks**

<b>Task</b>	<b>Tasks for 2024</b>	<b>Hours</b>
<b>1</b>	<b>Regional Energy Planning and Markets.</b> Review and provide technical advice on ISO-New England energy efficiency forecasts (EEFWG), regional system forecasts, regional system plans, the Forward Capacity Market, energy markets, and winter/summer system peak and reliability issues.	10
<b>2</b>	<b>Cost-Effectiveness and AESC/Avoided Costs.</b> Provide technical assistance on cost-effectiveness and economic analysis, impacts from all fuels, CT-specific avoided cost values, application of avoided cost values from the 2023 regional avoided cost study (AESC) to Connecticut, and valuing of benefits from C&LM relative to the GWSA and possibly other state energy policies. The major focus areas during 2024 will be the application impacts from various fuels related to electrification, including greenhouse gas emissions, and ensuring that the revised cost-effectiveness test and practices in Connecticut are applied correctly, and the application of any revised cost-effectiveness	30
<b>3</b>	<b>Inflation Reduction Act Coordination.</b> Work with the EEB, Companies, and DEEP to determine the best method of coordinating the C&LM program offerings with the IRA funding provided to the state. Assess financing best practices in other jurisdictions and bring forward recommendations for consideration as the state has an influx of federal funding for energy efficiency. Stacy to record her hours to here only to reflect the budget difference as noted in the footnote.	40
<b>4</b>	<b>Electrification and the Future of Natural Gas Programs.</b> In 2024, depending on the release of the CES, we foresee a significant focus on integration of electrification within the C&LM plan, including review of available and emerging technology to support the objective. Given the increase in electrification and limited gas budgets, the team will explore the role of natural gas programs and what gas efficiency measures should be offered as part of the 2025-2027 plan.	50
	<b>Total Hours for Tasks</b>	<b>130</b>
Chris Neme	50 Hours @\$232/hr	\$11,600
Phil Mosenthal	40 Hours @\$232/hr	\$9,280
Stacy Sherwood	40 Hours @\$232/hr*	\$4,640
<b>TOTAL LABOR</b>		<b>\$25,520</b>
Travel/Expenses		\$0
<b>TOTAL BUDGET</b>		<b>\$25,520</b>
*Due to an error in the proposal, Ms. Sherwood will only bill the EEB for 20 of the 40 hours under this category.		
**60 hours were moved from Cross-Sector to Residential to support IRA Coordination in 2024.		

**Energy Efficiency Board (EEB) C&I Technical Consultants  
(George Lawrence, Phil Mosenthal, and Dan Mellinger)  
2024 Work Plan with Tasks**

<b>Task</b>	<b>Tasks for 2024</b>	<b>Hours</b>
<b>1</b>	<b>C&amp;I Program Implementation Technical Assistance and Progress Review.</b> Under the oversight of the EEB’s C&I Committee, conduct technical monitoring and analysis of the C&I gas and electric program implementation and progress toward goals and metrics, including: monthly tracking of the C&I programs dashboards, Companies’ C&I program reports and the Green Bank’s C&I initiatives (including State and Municipal buildings and C-PACE); effectiveness of coordination among the Program Administrators, the CT Green Bank and other allied initiatives and contractors; and C&I program performance with respect to Plan goals and national/regional best-practices. Collaborate with the Program Administrators re: program implementation, customer service, program best-practices, training and education, decarbonization, equity, and quality assurance through the C&I Committee meetings, memo’s/reports, and direct communications with the PAs. Work with the DEI Consultants to incorporate equity practices for both the programs and workforce development, as well as provide feedback on the equity framework from a C&I perspective. In 2024, there will be a focus on the small business program and driving greater participation. Also there will be an exploration of whether an incentive could be provided to install behind-the-meter smart meters for Eversource customers interested in participation in strategic energy management.	266
<b>2</b>	<b>2025-2027 Plan Development.</b> Provide input on priorities, direction, and opportunities for advancing the C&I programs for the 2025-2027 Plan. Provide C&I program and budget planning technical oversight, analysis, and guidance to the EEB.	263
<b>3</b>	<b>C&amp;I Program Evaluation Technical Review and Input.</b> Provide C&I technical input to the Evaluation Committee and Consulting Team. Technical assistance to the Board and the Program Administrators on the application of all evaluation and research findings to enhance current implementation and cost efficiencies, and for future program planning and design efforts, including the next Plan update and pertinent revisions to the PSD.	200
<b>4</b>	<b>Technical Assistance for Advanced and Emerging Technologies.</b> Provide technical assistance for the incorporation of advanced and emerging technologies and services to the C&I programs in coordination with the Policy Working Group and the EEB’s RD&D Technical Consultant. Work to refine and enhance the process by which new technologies are evaluated.	8
<b>5</b>	<b>EEB Meetings and Technical Assistance.</b> Provide technical and process expertise for the Energy Efficiency Board.	112
<b>6</b>	<b>C&amp;I Committee Meetings and Technical Assistance.</b> Provide technical and process expertise for and at the C&I Committee meetings.	80
<b>7</b>	<b>Financing-Related Program Planning and Implementation.</b> Provide technical assistance to the EEB and the Joint Committee to ensure that Energize CT financing products continue to meet EEB priorities.	8
	<b>Total Hours for Tasks</b>	<b>937</b>
George Lawrence	747 Hours @232/hr	\$173,304
Phil Mosenthal	120 Hours @232/hr	\$27,840
Dan Mellinger	40 Hours @232/hr	\$9,280
Optimal Analyst	30 Hours @232/hr	\$6,960
<b>TOTAL LABOR</b>		<b>\$217,384</b>
Travel/Expenses		\$2,565
<b>TOTAL BUDGET</b>		<b>\$220,784</b>

**Energy Efficiency Board (EEB) Residential Sector Team  
(Richard Faesy, Glenn Reed, Elizabeth Chant, and EFG Analyst)**

**2024 Work Plan with Tasks**

Task	Tasks for 2024	Hours
1	<p><b>Residential Program Implementation Review and Enhancements.</b> Conduct periodic program implementation and status reviews including monthly calls and periodic in-person meetings with the Companies' implementation and planning staff to review progress to date and upcoming electric and gas program plans, opportunities, and challenges. These efforts will be informed by ongoing technical reviews of Company reporting and the Energize CT dashboard, benchmarking against similar programs in other jurisdictions, and from comparison of year-to-date program results to Board and Plan priorities and goals. Work will continue with the DEI Consultant in 2024, with the development of the equity framework and providing the information needed to support the baseline for the equity PMI metric. Two particular items of close scrutiny will be the 2024 budget and spend rate for Eversource Electric from the borrowing forward of funds and the low performance experienced thus far from the UI and SCG HES-IE Programs. Additionally, there will be continued tracking of the development and implementation of E-Track, Avangrid's data tracking system, and the ability to report accurate information.</p> <p>As appropriate and/or as requested by the Board, summarize and present requested findings from the research and oversight at the Residential Committee and/or at full Board meetings.</p>	160
2	<p><b>2025-2027 Plan Development.</b> Provide residential program and budget planning technical oversight and guidance for the Board's collaborative process with a focus on development of 2025-2027 Plan, including assessment of new program designs and measures, savings goals, performance metrics and budgets. Work with the Companies, DEEP and other parties to identify, characterize and, as appropriate, implement both new technologies and enhanced program practices to improve the savings and cost effectiveness of both energy and demand related efficiency activities.</p> <p>Tasks include reviewing and providing comments, recommendations, and advice related to revised program plans, budgets and budget tables, public input, program cost-effectiveness, goals and performance indicators. Key program planning and oversight activities will include:</p> <p>a. Review year to date program efforts, public input comments, recent evaluation and market research findings, the Comprehensive Energy Strategy, and best practices activities in other jurisdictions. In the context of the Board's Plan priorities work with the Companies to develop program goals, program designs, budgets, and performance metrics.</p> <p>b. Provide technical review of, and comments on, Company proposed program plan text, savings goals and budgets; responses to public and stakeholder input; assessment of program/measure technical assumptions including incentive levels and participation rates, cost-effectiveness, goals and performance metrics; incorporation of the findings of program evaluations; and updating of the Program Savings Document (PSD).</p>	190

3	<p><b>Residential Program Evaluation Review.</b> Provide input and recommendations regarding evaluation planning and implementation. Use evaluation findings to improve program performance, cost effectiveness, and cost efficiencies. Specific tasks include providing direction on the scoping of the evaluations, review and comment on key evaluation and market research reports and working to apply evaluation results and findings to current implementation and to future program planning and design efforts, including the 2024 Plan update. Evaluation findings will also be used to inform revisions to the PSD. Provide review and comment on Company-led market research activities that are not overseen by the Board’s Evaluation Consultant. Provide technical expertise as needed for new technology assessments through the Policy Working Group.</p>	155
4	<p><b>Inflation Reduction Act Coordination.</b> Work with the EEB, Companies, and DEEP to determine the best method of coordinating the C&amp;LM program offerings with the IRA funding provided to the state. Assess financing best practices in other jurisdictions and bring forward recommendations for consideration as the state has an influx of federal funding for energy efficiency. Includes meetings related to the coordination of WAP and HES-IE Programs.</p>	130
5	<p><b>EEB Meetings and Board Technical Assistance and Engagement.</b> Attend Board and other Board-related meetings. Provide technical assistance and issues resolution. Activities include:</p> <ul style="list-style-type: none"> <li>a. Provide residential technical and process expertise for and at Board meetings, the annual Public Input Session, and meetings, including those with DEEP, Connecticut Green Bank, CT Technical Advisory Committee (CTAC), among others. Specific tasks as directed and determined.</li> <li>b. Coordinate with the Department of Energy and Environmental Protection (DEEP), the Connecticut Green Bank, DEEP’s DEI consultant, and other parties on overall Board policies and Plan priorities, as directed by the Board.</li> <li>c. Respond to customer/trade ally inquiries, provide technical expertise and assistance for issue resolution, coordinate with the Companies and inform the Board on progress and issues with the Companies, and their program performance, as directed by the Board.</li> </ul> <p>Participate, as needed, in discussions and other activities related to proposed revisions to Connecticut's cost-effectiveness framework and other related federal funding planning.</p>	70

<b>6</b>	<p><b>Residential Committee Meetings.</b> Provide technical and process expertise for and at Residential Committee meetings. Work with the Committee’s Board members, the Board’s Executive Secretary, the Companies, DEEP, Home Energy Solutions (HES) vendors, Community Action Agencies, and other stakeholders to:</p> <p>a. Discuss and develop monthly Residential Committee agendas then assist in the monthly meetings.</p> <p>b. Highlight and discuss best practices in other jurisdictions and regions to inform continued program enhancements. Present results from national/regional best-practices programs and assist in their application to continuously improve the programs.</p> <p>c. Review and discuss current program performance relative to Plan goals, objectives, and budgets. As needed, identify significant deviations from expected performance for full Board discussion.</p> <p>d. Respond to and discuss vendor and other parties’ feedback on program operations and proposed program enhancements.</p>	110
<b>Total Hours for Tasks</b>		<b>815</b>
Richard Faesy	625 Hours @\$232/hr	\$145,000
Glenn Reed	120 Hours @\$232/hr	\$27,840
Elizabeth Chant	30 Hours @\$232/hr	\$6,960
EFG/Optimal Analyst	40 Hours @\$232/hr	\$9,280
<b>TOTAL LABOR</b>		<b>\$189,080</b>
Travel/ Expenses		\$2,565
<b>TOTAL BUDGET</b>		<b>\$192,480</b>

**Energy Efficiency Board (EEB) Research, Development and Demonstration Consultant  
(Dan Mellinger)**

**2024 Work Plan with Tasks**

<b>Task</b>	<b>Task for 2024</b>	<b>Hours</b>
<b>1</b>	<b>Preparation and Attendance at PWG Meetings.</b> The PWG will hold quarterly meetings in 2024, for a total of four meetings. This TC will attend the meetings, providing technical assistance through the development of a new emerging technology review process. Given the restructuring of the group, we foresee limited adoptions in 2023, but expect increased productivity from the group going forward. The RD&D Consultant will provide updates from the meetings to inform the EEB of the group’s progress. The TCs will also reach out to surrounding states, such as Rhode Island, Vermont, etc. to determine if there is interest in leveraging emerging technology opportunities.	30
	<b>Total Hours for Tasks</b>	<b>30</b>
Dan Mellinger	30 Hours @\$232/hr	<b>\$6,960</b>
Travel/Expenses		\$0
<b>TOTAL BUDGET</b>		<b>\$6,960</b>



**Energy Efficiency Board Marketing/Analysis Consultant  
(Ashley Nicholls)**

**2024 Work Plan with Tasks**

<b>Task</b>	<b>Tasks for 2024</b>	<b>Hours</b>
<b>1</b>	<b>Energize CT Website.</b> Support to the website team in ongoing improvement of website user experience and improvement of website infrastructure. Strategic oversight of content development, and measurement strategy.	30
<b>2</b>	<b>Marketing Performance Standards.</b> Lead monthly marketing meetings. The purpose of the meetings will be to (1) develop a more in-depth understanding of the marketing efforts, (2) encourage frequent collaboration, and (3) assist with the develop of a general awareness effort to inform Connecticut ratepayers about electrification and the C&LM in general. Review of positioning of and strategies for marketing in 2024, including review of the appropriate level and nature of programmatic marketing and integration of consumer insights. Supply of new/fresh consumer insights and integration of best practices from other states/utilities. Provide holistic strategy for creating economies of scale through combined marketing efforts.	50
<b>3</b>	<b>Attend EEB Meetings.</b> Attend EEB meetings where marketing is discussed. Work with the Companies in the development of their annual marketing presentation and provide feedback. Provide responses to follow ups raised during EEB and Committee meetings related to marketing as necessary.	10
<b>4</b>	<b>Energize CT Brand.</b> In 2023, it was identified that there should be parameters around the Energize CT Brand, in particular, what energy related matters fall under the brand, how it should be used, and what does it mean. In 2024, we will work to provide guidelines around the Energize CT Brand.	40
	<b>Total Hours for Tasks</b>	130
Ashley Nicholls	130 Hours @\$232/hr	<b>\$30,160</b>
Travel/Expenses		\$0
<b>TOTAL BUDGET</b>		<b>\$30,160</b>

**Energy Futures Group Administrative and Accounting Support  
(Mariana DuBrul)**

**2024 Work Plan with Tasks**

<b>Task</b>	<b>Tasks for 2024</b>	<b>Hours</b>
<b>1</b>	<b>Invoicing and contracting.</b> Compile invoices on a quarterly basis, including the submission of expenses. Complete all contracting requirements. Follow up on administrative, contracting, and invoicing with the EEB.	27
	<b>Total Hours for Tasks</b>	27
Mariana DuBrul	27 Hours @\$62/hr	<b>\$1,674</b>
Travel/Expenses		\$0
<b>TOTAL BUDGET</b>		<b>\$1,674</b>

Technical Consultants

Technical Consultants Estimated Travel Expenses												
Staff	Air travel	Car Rental	Mileage	Mileage Rate	Mileage Cost	Airport Parking	CT Parking	Hotel	Meals	Total per Trip Expenses	Number of Trips	Total Annual Expenses
Sherwood	\$500.00	\$226.00	70	\$0.625	\$43.75	\$36.00	\$15.00	\$314.67	\$135.80	\$1,271.21	6	\$7,627
Faesy			573	\$0.625	\$358.13		\$15.00	\$120.00	\$120.98	\$614.11	6	\$3,685
Lawrence			573	\$0.625	\$358.13		\$15.00	\$120.00	\$120.98	\$614.11	6	\$3,685
<b>Total*</b>												\$12,759

\*Final total was adjusted to reflect that Faesy and Lawrence will commute together on three trips, which will reduce the overall total by \$2,238.75.